

VOLUNTEERS

1. you need volunteers - too much work for staff alone; networking with other volunteers; great ambassadors for the institution; more involvement means more money
2. you are looking for - commitment to the institution; energetic; articulate; time availability (Mike Creem story)
3. it's easier to do it myself syndrome
4. training is important - written job descriptions; timetable; discussion of "plan b"
5. ok to say no to "Mother Exeter"
6. provide competitions - lose your lybunts, top ten categories by age group
7. reward success - class agent awards at business meeting
8. the art of nudging
9. firing volunteers
10. fund raising is business

TIPS FOR SUCCESSFUL CLASS AGENTS

While the basic strategy and schedule have been outlined in this manual, there is significant room for creativity. Begin thinking about your individual class. Your initiative, leadership and commitment will determine the campaign's success.

- **MAKE YOUR COMMITMENT (GIFT/PLEDGE) EARLY.**
As a Class Agent, you are setting the pace for the rest of your classmates. Also, it will make your job of asking for gifts much easier if you can say, "Join me in supporting Exeter."
- **MAKE CONTACT EARLY AND OFTEN WITH CLASSMATES.**
Take advantage of any opportunity to connect with classmates throughout the year. Waiting until the end of the campaign/fiscal year, (June 30), creates more work and lost opportunity.
- **ATTEND CONFERENCE CALLS.**
These calls are designed to provide you with answers to your questions and information you need to perform your duties as a Class Agent. It also provides a platform for you to share ideas with your fellow agents and discuss fund-raising strategies.
- **PERSONALIZE CONTACTS.**
Classmates enjoy receiving personalized communications. Contact as many of your classmates as possible, by phone or through personal visits. Whenever you send an email or a letter, remember to personalize it!
- **ATTEND AND RECRUIT CLASSMATES TO ATTEND REGIONAL PHONATHONS.**
Phonathons are a great way to make a number of contacts in one evening. The more classmates you recruit, the more successful the evening will be.
- **CONDUCT A VIRTUAL PHONATHON.**
Work with other Class Agents to conduct a virtual phonathon from home. A virtual phonathon is a phonathon conducted by classmates on the same evening from their own location rather than from one common location.
- **FOCUS ON PARTICIPATION RATHER THAN GIFT SIZE.**
It is participation Exeter values most.
- **USE THE ONLINE DIRECTORY AND VOLUNTEER ONLINE REPORTS (VOR).**
You can access up-to-date information on fellow Exonians through the Academy's online directory. The directory is also a place to update us of any changes in your personal information. VOR provides immediate access to the fundraising status of your class.
- **TEAM EFFORT.**
Work as a team with your Annual Giving staff cohort. They are available to assist you and answer any questions.

YOUR ROLE AS CLASS AGENT

As a Class Agent, you are raising support and awareness specifically for Exeter's Annual Fund. Exeter alumni/ae may be asked to support the Academy in multiple ways. The following are a few distinctions regarding the Annual Fund in comparison to other solicitations:

- the Annual Fund provides roughly 10 percent of Exeter's operating budget each year
- gifts to the Annual Fund are for current, unrestricted use for some of Exeter's highest priorities
- the Annual Fund helps to meet the current needs of the Academy such as faculty and staff support, campus improvements, student life as well as many other important programs
- support of the Annual Fund is encouraged from all alumni/ae even if they are directing support to other areas of Exeter

While there are many ways to support Exeter, the gift of time is considered the most important. In asking you to serve as a Class Agent, we have an obligation to make the experience rewarding and to make good use of the time you give so generously.

RESPONSIBILITIES OF THE CLASS AGENT:

- ✓ **Make your own commitment (gift/pledge) to the Annual Giving Fund early. Lead by example!**
- ✓ Attend Alumni/ae Council Weekend!
Fri., Sept. 28-Sat., Sept. 29, 2007
- ✓ Solicit classmates through written, verbal and electronic communication for gifts to the Annual Giving Fund
- ✓ Thank classmates who have contributed to the Annual Giving Fund; although all donors receive an acknowledgment from the Academy, Class Agents should also write, call or email their own note of thanks to classmates
- ✓ Attend phonathons in your area, AND recruit classmates to attend phonathons in their areas
- ✓ Maintain close communication about classmates with the Annual Giving office – including information about top prospects, (Section 2 - 1781 Society), address, telephone and e-mail changes for home and business, as well as births, deaths, marriages and general feelings about Exeter
- ✓ Encourage classmates to participate in Exeter activities, such as regional dinners, special events and visits to campus
- ✓ Encourage classmates to register for ExieNet, Exeter's online tools and services for alumni/ae

RESPONSIBILITIES OF THE ANNUAL GIVING OFFICE:

- ✓ Produce brochures and letters to send to Class Agents in October and February for their personal messages; we will provide sample fund-raising letters upon request
- ✓ Arrange all mailings for distribution to Class Agents, including the preparation of all envelopes with postage and response mechanisms
- ✓ Send gift and pledge acknowledgments with notes of thanks to donors
- ✓ Organize regional phonathons across the country
- ✓ Coordinate conference calls for Class Agents
- ✓ Provide bi-monthly volunteer updates about your individual class progress, as well as timely news, figures and other information about the campaign
- ✓ Supply calling cards to Class Agents upon request; please contact the Annual Giving office at (603) 777-3473 or annualgiving@exeter.edu

Your role as Class Agent

No brochure or case statement can take the place of the personal contact you have with your fellow Exonians. Your consistent contact with classmates is the single most persuasive factor in increasing both your class percentage of participation and overall giving. When you thank consistent donors for their past support, you increase the likelihood that they will give again. When you reach out to classmates who give infrequently, you help them understand *why* their gift is important. When you listen to concerns or questions, you help your classmates learn more about the Exeter of today.

The Exeter Initiatives give us an opportunity to demonstrate more clearly the vital link between the Annual Giving Fund and the quality of our students and teachers. We must convey more urgently the importance of these annual gifts.

After the endowment, the Annual Giving Fund is the only other significant source of revenue that can provide the “margin of excellence” that makes Exeter unique—unless the school chose to rely on larger tuition increases, which would have a detrimental effect on students and families. Without the Fund, therefore, fewer financial aid students would be admitted, faculty salaries would be lower, and students would have fewer resources at their disposal, whether it be library books or athletic equipment.

This is the message we must convey through The Exeter Initiatives: that annual gifts, whether large or small, have true power. They are integral to Exeter’s character, and through the Annual Giving Fund, every Exonian can contribute in a real way to strengthening and enriching the school that means so much to us all.

The success of the Annual Giving Fund within The Exeter Initiatives would be impossible to achieve without your efforts. We thank you in advance for your belief in Exeter and for the time and energy you will spend on talking with and writing to your classmates.

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The purpose of the Class Agent Manual is to provide a detailed overview of your volunteer role as a Class Agent, as well as to suggest ways in which the Annual Giving Office can support you in this important work for your class. The information is arranged in the sections listed on the right.

Our ambition, simply stated, is to conduct an annual giving campaign that is “second to none” in attracting a broad base of support from alumni/ae, parents, grandparents and friends.

With grateful thanks for your participation in this effort,

The Annual Giving Staff

1	ANNUAL GIVING AT EXETER <ul style="list-style-type: none"> ○ Academy Mission Statement ○ Your Role as Class Agent ○ Tips for Successful Class Agents ○ The “Case” for Annual Giving ○ Methods of Giving
2	THE 2007-08 FUND YEAR <ul style="list-style-type: none"> ○ Annual Giving Fund Goals ○ Non-Reunion Class Goals ○ The 1781 Society ○ Campaign Timeline
3	COMMUNICATION <ul style="list-style-type: none"> ○ Mail ○ Telephone ○ Phonathons ○ Email ○ Online Resources ○ Mail Rules
4	VOLUNTEER UPDATES <ul style="list-style-type: none"> ○ VOR (Volunteer Online Reports) ○ Volunteer Updates – What to Expect ○ Guide to Interpreting a Detail Report ○ Sample Detail Report ○ Sample Volunteer Update
5	REFERENCE <ul style="list-style-type: none"> ○ Q & A ○ Volunteer Leadership Positions ○ Legacies ○ Glossary of Terms
6	PROSPECT LIST



ANNUAL GIVING FUND

THE FIRST PRIORITY OF THE EXETER INITIATIVES

Supported by Phillips Exeter Academy Alumni/ae,
Parents, Grandparents and Friends

September 2007

Dear Exeter Class Agents,

The leaves are beginning to change here in New Hampshire – a sure sign that the time has come to kick off this year's 2007-08 Annual Giving Fund campaign.

Exeter continues to have a vibrant Annual Fund program. Last year's final dollar total of \$7,447,625 set a new standard of support. And our 50.8% alumni/ae participation rate marked the 23rd year of 50% or higher participation. These achievements would not be possible without the dedication and talent of our Class Agents.

Our goal this year is to raise the dollar and donor bar even higher. Later this month, we plan to send to you the first round of solicitation materials for your personalization. Taking the time to write meaningful messages to your classmates will pay dividends in both dollars and donors.

Many of you are reading this message on-line, opting for the electronic version of the Class Agent Manual over hard copy. I encourage you also to use VOR (volunteer on-line reports) rather than the traditional hard copy class prospect list. The biographical and giving information accessible through VOR is updated daily, thus making it much easier to stay informed about your classmates. If you have any questions about VOR, feel free to call the office at 603-777-3473.

All of us in the Annual Giving Office look forward to working with you. A member of the staff will be contacting you soon to discuss the specific plans for your class. Thank you for volunteering your time and energy to the Academy. Your efforts throughout the year will greatly benefit today's Exeter students and faculty.

Sincerely,

Wayne Loosigian
Director of Annual Giving



VOLUNTEER UPDATE

June 2007 ♦ Distributed by the Annual Giving Office/603-777-3473/annualgiving@exeter.edu

Annual Giving Update

You have done it again! Exeter's Annual Giving Fund has once again exceeded its dollar goal by a healthy margin, allowing the school to continue offering an education second to none. And we also have extended our streak of 50% alumni/ae participation to 23 years. Remarkable! These achievements would not be possible without the hard work of our volunteer fund-raising team. Speaking for the entire AA&D staff, I thank each of you for your donations of time, talent and treasure. Enjoy the summer!

Wayne Loosigian
Wayne Loosigian
Director of Annual Giving

Final Donor List

Enclosed with this mailing is a final list of donors for your class. Please review this information carefully, and contact the Annual Giving Office if you have any questions or concerns. Again this year, donor lists will be sent to individual classes in September along with a campaign update from Chuck Harris '69, Chair of The Exeter Initiatives.

Top Ten Non-reunion Classes

Congratulations to those Class Agents who ranked in the top ten classes for total dollars, total donors, and percent of participation. See attached lists for details (non-reunion classes only). Here are some highlights:

- ▶ We commend Ed Mills '51 for his commitment and unwavering determination, leading his class to 100% participation for the first time. Congratulations on this accomplishment!
- ▶ The Class of '69 surpassed \$200,000 mark again this year, holding on to the number one position in total dollars among all non-reunion classes. Special thanks go to volunteers George Bain, Curt Perry, and Dave Underhill for their hard work and dedication.
- ▶ Volunteers in the Class of '88, again, did an amazing job securing gifts from 223 classmates for 61.43% participation. The class of '88 has the second highest class roll of any non-reunion class (the class of '94 has 367) making it more difficult to exceed the 60% mark in participation. Persistence really paid off for volunteers Lara Alden Arrighi, Jon Bicknell, Kurt Ehrig, Brad Gibbs, Liza Millet, Katie Procter, Laurisa Shappell Schutt (head agent), and Jay Smith as they concentrated their many calling efforts on all non-donors.

End-of-Year Totals

	Total Dollars	Total Donors
June 30, 2007	\$7,447,625	10,973

GOAL: \$7,300,000

% OF GOAL ATTAINED: 102.02%

ALUMNI/AE PARTICIPATION: 50.8%

	Total Dollars	Total Donors
June 30, 2006	\$7,282,303	10,871

GOAL: \$7,000,000

% OF GOAL ATTAINED: 104.03%

ALUMNI/AE PARTICIPATION: 50.3%

Reunion Classes

Congratulations to volunteers in all twelve reunion classes, raising a total of \$2,299,916 for the Annual Fund.

The Class of 1952 broke the record for total AG dollars (\$503,344), total dollars (\$28,151,811) and total participation (91.52%) for a 55th reunion thanks to the efforts of Don Bomann, Tom Ehrlich, Jack Fritts, Paul Handelsman, Sumner Kaufman, Jim Monahan, Stan Phelps, John Pope, and Jack Rae.

Randall Thomas Klein, Jr. '41 (1923-2007)

It is with sadness we say goodbye to a devoted Exonian and Class Agent, Tom Klein '41. Tom passed away suddenly on June 16, 2007 in Auburn, CA while visiting with his stepson enroute to live with his daughter in Minnesota. We will miss his fondness and appreciation for his time at Exeter, the stories of his many world-wide travels (to six continents), and his enthusiasm for life.

Save the Date for ACW

Please mark your calendars to be back on campus for Alumni/ae Council Weekend on Friday and Saturday, **September 28th - 29th**. Come join other Exeter volunteers to celebrate the achievements of 2006-07 and make plans for the coming year. We look forward to seeing you!